

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT		1. CONTRACT ID CODE	PAGE OF PAGES 1 2
2. AMENDMENT/MODIFICATION NO. 0005	3. EFFECTIVE DATE 03/16/98	4. REQUISITION/PURCHASE REQ. NO. 0-7-J9-07-07-A79	5. PROJECT NO. (If applicable)
6. ISSUED BY INTERNAL REVENUE SERVICE A/C (PROCUREMENT) M:P:I:D 6009 Oxon Hill Road, 7th Floor Oxon Hill, MD 20745	7. ADMINISTERED BY (If other than Item 6) CODE	CODE	
8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code) TO ALL OFFERORS		(T)	9A. AMENDMENT OF SOLICITATION NO. X TIRNO-97-R-00071
			9B. DATED (SEE ITEM 11) February 3, 1998
		10A.	MODIFICATION OF CONTRACT/ORDER NO.
		10B.	DATED (SEE ITEM 13)
CODE	FACILITY CODE		

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

X The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers ___ is extended, X is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:

(a) By completing Items 8 and 15, and returning 1 copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPRIATION DATA (If required)

13. THIS ITEM APPLIES ONLY TO MODIFICATIONS OF CONTRACTS/ORDERS, IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation data, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b)
C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
D. OTHER (Specify type of modification and authority)

E. IMPORTANT: Contractor ___ is not, ___ is required to sign this document and return ___ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

See the description on page 2.

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print)	16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print)
	JEFFREY PETRINO, CONTRACTING OFFICER
15B. CONTRACTOR/OFFEROR	16B. UNITED STATES OF AMERICA
15C. DATE SIGNED	16C. DATE SIGNED
BY (Signature of person authorized to sign)	BY (Signature of Contracting Officer)

Description of Amendment:

The purpose of this amendment is to: (A) incorporate changes in certain parts of RFP Sections C and E as already stated in various responses to industry's questions (see Final RFP Questions and Answers Releases #1 through #6); (B) delete an erroneous proposal instruction in RFP Attachment 7, Electronic Payments; and (C) amend RFP Attachment 9, Market Segment Customer Rating, to further explain how this will be done for Proposal Evaluation Step 2, Factor 3- Focus Group Review.

The changes cited below are made in the text of the solicitation provided with this amendment. A page heading, Revised by Amendment 0005, is included where the text is changed.

- (1) Section C.2.3 SCOPE is revised to clarify the Forms in the 1040 series that are included as already stated in the responses to industry questions.
- (2) Section C.2.7 Schedule of Performance is revised to: (a) clarify that the schedule applies to pilots for individual and business returns as already stated in the responses to industry questions; (b) extend the contract base year date to July 31, 1998, as already stated in the responses to industry questions; and (c) correct the Option Year 1 date to July 1, 1999, and the Option Year 2 date to July 1, 2000.
- (3) Section E.1(g) is revised to delete the statement that initial offers should contain the Offeror's best terms from a price standpoint. As already stated in Section E.2.1.2.1, initial offers require only that maximum prices be stated.
- (4) Section E.2.1.2 is amended to include the PROPOSAL SUBMISSION instructions already included in the NEWS FLASH on the Solicitation's web page.
- (5) Section E.2.1.3 is amended to clarify Pilot sizes as already stated in the responses to industry questions.
- (6) Attachments 7 and 9 are amended as stated above.

Section C
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tap the creativity of the private and public sector to identify and pilot approaches to electronic tax administration that would enable and motivate those individuals, practitioners, businesses, financial institutions, state governments, and other information exchange partners who currently transact business with the IRS using paper or magnetic based media, to move to primarily electronic transactions. The scope of this RFP will focus on expanding the use of only the existing ETA programs. Current ETA programs include:

- Form 1040 series, U.S. Individual Income Tax Returns (including Form 4868, Application for Automatic Extension of Time to File U.S. Individual Income Tax Return and Form 9465, Installment Agreement). [The Form 1040 series refers to the Form 1040, Form 1040A, Form 1040EZ and all associated forms and schedules.](#)
- Form 941, Employers Quarterly Federal Tax Return
- Form 1041, U.S. Income Tax Return for Estates and Trusts and Schedules K-1 (Form 1041), Beneficiary's Share of Income, Deductions Credits, etc.
- Form 1065, U.S. Partnership Return of Income and Schedule K-1 (Form 1065), Partner's Share of Income, Credits, Deductions, etc.

C.2.4 CONTRACT REQUIREMENTS

The potential Contractor shall pilot innovative approaches for the 1999 Filing Season that would enable and motivate those individuals, practitioners, businesses, financial institutions, state governments, and other information exchange partners who currently transact business with the IRS using paper-based media, to move to primarily electronic transactions. The pilot approach may include but is not limited to the following features:

- Providing burden and cost reduction measures such as electronic authentication;
- Offering improved service to electronic filers such as providing an easily accessible method for obtaining an accurate and timely status on return processing and refund issuance;
- Integrating related features such as electronic Powers Of Attorney (POA) or Taxpayer Information Authorization (TIA) with the electronic filing program;
- Increasing taxpayer confidence in the security and privacy of electronic transmissions through encryption;
- Expanding accepted forms and schedules; and
- Providing electronic payment options.

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C.2.7 SCHEDULE OF PERFORMANCE

The following is a proposed performance schedule for each customer market segment (individual and business).

Responsible Party	Event	Base Year Date	Option Year 1 Date	Option Year 2 Date
IRS	Contract Award	July 31, 1998	July 1, 1999	July 1, 2000
Contractor	Begin testing of features with IRS. Testing requirements for pilots will be provided to Contractor at contract award.	September 1, 1998	September 1, 1999	September 1, 2000
Contractor (IRS will assist if requested)	Identify pilot participants including electronic return originators, <i>e-file</i> software developers, transmitters. Where necessary, have participants submit application form to participate in program (Form 8633 for individual program, Letter of Application for payroll tax program (Form 941) or Form 9041 for business programs (Forms 1041 and 1065).	September 15, 1998	September 15, 1999	September 15, 2000

Responsible Party	Event	Base Year Date	Option Year 1 Date	Option Year 2 Date
Contractor	All pilot participants complete suitability, participants acceptance testing, and communications testing as required in the applicable IRS publication (Publication 1345 (Form 1040), Revenue Procedures 97-47 and 97-17 (Form 941), Publication 1437 (Form 1041), or Publication 1524 (Form 1065).	December 31, 1998	December 31, 1999	December 31, 2000
Contractor	Complete testing of features.	December 31, 1998	December 31, 1999	December 31, 2000
Contractor	Begin pilot	January 12, 1999	January 12, 2000	January 12, 2001
Contractor	Pilot concludes	April 17, 1999	April 17, 2000	April 17, 2001
Contractor	Contractor provides Pilot Findings Report	May 15, 1999	May 15, 2000	May 15, 2001
IRS	IRS review of Pilot Findings Report and IRS decision on expanded pilot option if applicable and negotiation of the required changes for the option period	June 15, 1999	June 15, 2000	June 15, 2001
IRS	Exercise option	June 30, 1999	June 30, 2000	

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- (11) If the offer is not submitted on the SF 1449, include a statement specifying the extent of agreement with all terms, conditions, and provisions included in the solicitation. Offers that fail to furnish required representations or information, or reject the terms and conditions of the solicitation may be excluded from consideration.

(c) Period for acceptance of offers. The offeror agrees to hold the prices in its offer firm for 180 calendar days from the date specified for receipt of offers, unless another time period is specified in an addendum to the solicitation.

(d) Product samples. When required by the solicitation, product samples shall be submitted at or prior to the time specified for receipt of offers. Unless otherwise specified in this solicitation, these samples shall be submitted at no expense to the Government, and returned at the sender's request and expense, unless they are destroyed during preaward testing.

(e) Multiple offers. Offerors are encouraged to submit multiple offers presenting alternative terms and conditions or commercial items for satisfying the requirements of this solicitation. Each offer submitted will be evaluated separately.

(f) Late offers. Offers or modifications of offers received at the address specified for the receipt of offers after the exact time specified for receipt of offers will not be considered.

(g) Contract award (not applicable to Invitation for Bids). The Government may evaluate offers and award a contract without discussions with offerors. However, the Government reserves the right to conduct discussions if later determined by the Contracting Officer to be necessary. The Government may reject any or all offers if such action is in the public interest; accept other than the lowest offer; and waive informalities and minor irregularities in offers received.

(h) Multiple awards. The Government at its discretion may award approximately one or more contract(s) as a result of this solicitation. This does not, however, commit the Government to making award of a contract to any specific number of Offerors.

E.2. ADDENDUM TO FAR 52.212-1

E.2.1. PROPOSAL PREPARATION INSTRUCTIONS

E.2.1.1. TECHNICAL PROPOSAL APPROACHES

Except as otherwise stated below, each proposal submitted in response to this RFP is limited to

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one customer market segment per proposal. For example, a proposal shall include information pertaining to one primary market segment (Individual or Business) and only one customer market segment as follows:

Individual

- individual returns filed by tax practitioner
- individuals who use a software package to prepare their return
- individuals who prepare their return manually

Business

- Form 941
- Form 1041
- Form 1065

Within the above constraint, Offerors may submit one or more proposals which contain either: (1) an integrated solution with multiple features (e.g., electronic authentication, electronic payment options, and electronic, account resolution) or (2) a solution with a single feature (e.g., a signature alternative). NOTE: Examples are not meant to suggest preferences or to limit solutions. Notwithstanding the above, Offerors may take an integrated view of a taxpayer's many roles dealing with the IRS if the Offeror can provide a convincing rationale that such a solution would result in additional motivation for the taxpayer to file all required forms electronically. For example, a sole proprietor is a Form 1040 (Schedule C) filer as well as a Form 941 filer. If an Offeror believes that such a taxpayer would be more inclined to use e-file if there were an opportunity to file both forms, then the Offeror would submit one proposal each for the Form describing the advantages that would result from a pilot that integrates both market segments. If each of the Offeror's other proposal is considered among the highly rated proposals for the respective market segment, then the Government will consider any additional value that would be obtained from acquiring a proposed pilot for both market segments.

E.2.1.2. INITIAL PROPOSAL

Each offeror shall first submit one or more initial proposals which shall include all of the items stated below. The Government shall consider the initial proposal to be a firm offer in response to the RFP which may be accepted and which may form the basis of a formal contract.

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The delivery address is: Internal Revenue Service, Office of Information Systems Acquisition, Attention: Jeffrey P. Petrino, Contracting Officer, 6009 Oxon Hill Road, Suite 700, Oxon Hill, MD 20745. We ask that proposals be submitted in two complete sets on diskette, in either Microsoft 7.0A or lower version or WordPerfect 6.1 or lower version. The "three to five pages" for each initial proposal (on diskette) applies to the information requested in the RFP's Section E.2.1.2.1. The other information requested in E.2.1.2.2 and E.2.1.2.3 may be on additional pages of text (on diskette). Any product literature or similar information submitted may be either on diskette or on paper. A complete and signed Standard Form 1449 (See Section A, Items 17 and 30 at a minimum) shall be submitted in three paper copies.

E.2.1.2.1 Technical Approach/Maximum Price

The technical approach will include a brief synopsis of the Offeror's proposed pilot. The submission shall be three to five pages and shall be prepared using the following format:

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similar products or services. Performance information will be used for both responsibility determinations and for subjective evaluations. The government will focus on information that demonstrates quality of performance relative to the size and complexity of the procurement under consideration. The Performance Information Form identified in Section D will be used to collect this information. References other than those identified by the offeror may be contacted by the Government with the information received used in the evaluation of the offeror's past performance.

E.2.1.2.3. Other Contents

Each preliminary proposal shall include all items, as applicable, stated in E.1(b) above.

E.2.1.3. TECHNICAL PROPOSAL

Each offeror who is notified to submit a final proposal as a result of Step 1 (see Section E.3.1), shall provide a technical proposal in the form of a pilot plan for the base year and each option year. The pilot plan shall be submitted in the following format:

A. Introduction

1. General Information
2. Point of contact information (name, address, phone number, e-mail address and fax number), and
3. Key Personnel - Provide a resume (not to exceed 2 pages) for the Project Manager

B. Pilot Description

1. Objective and description of the proposed pilot for the base year and expanded pilot for the option years
 - include a detailed description of the proposed solution
 - include a discussion of the offeror's utilization of the proposed solution for similar applications
2. Pilot features (e.g. authentication, payments, etc.)
3. Strategy for integrated solutions (if applicable)
4. Changes required to IRS systems or procedures
5. Pilot recommendations (size: number of returns, number of practitioners, and/or number of sites) Offerors should assume a smooth pilot in the first year and at least double pilot sizes for each of the option years. If the first year included a pilot of 5,000 accepted returns, the second year should be 10,000 returns, and the third year should be 20,000 returns.

Electronic Payments

Payments -- With passage of the Taxpayer Relief Act of 1997, for the first time the federal government can accept tax payments via any commercially acceptable means. The North American Free Trade Agreement (NAFTA) did mandate that businesses of a certain size make their tax payments electronically. Today, businesses who make electronic payments make them to the Electronic Federal Tax Payment System (EFTPS) (See page 11 of RFP ATTACHMENT 3).

IRS is seeking business/government partnerships for making it more convenient for the taxpayer to pay taxes owed, reducing governmental costs and improving cash flow to the federal government. This can be achieved, in part, by creating integrated filing/electronic payment options. This includes proposed contracts whereby third parties accept tax payments on behalf of the government and forward them to IRS. Priority consideration will be given to proposals to facilitate payment which accompany electronically filed tax returns reflecting a balance owed. However, IRS is also interested in more efficient business solutions to receipt of non-return related tax payments (for example: estimated taxes, payments with extensions to file a tax return, etc.)

The IRS is prohibited (also by the Taxpayer Relief Act of 1997) from paying any consideration associated with acceptance of credit card payments. Proposals must provide information regarding plans for dealing with such fees. IRS reserves the right to place limits on how much can be charged to taxpayers over and above merchant fees charged by credit card companies.

The Bankruptcy Reform Act of 1994 added to a new section, 11 USC 523(a)(14), which put debt "incurred to pay a tax to the United States" on the same nondischargeable basis as taxes provided for in section 523(a)(1). The House Report stated that the purpose of the section was to make "...loans that are used to pay Federal taxes nondischargeable under section 523. This will facilitate individuals ability to use their credit cards to pay their Federal taxes."

Neither section 161 nor 170 of the Truth in Lending Act (15 U.S.C. 1666) nor any similar provisions of State law will apply to a payment of internal revenue taxes. The term "creditor" under section 103(f) of the Truth in Lending Act shall not include the Secretary of Treasury with respect to credit card transaction in

payment of internal revenue taxes.

A payment of internal revenue taxes by a person by use of a debit card shall not be subject to section 908 of the Electronic Transfer Act (15 U.S.C. 1693f) or to any similar provision of State law, is an error alleged by a person is an error related to the underlying tax liability, rather than an error related to the debit card account (such as a computational error or numerical transposition in the debit card transaction or an issue as to whether the person authorized payment by use of the debit card.)

Payment transactions may be accepted electronically with a return through an electronic return originator (ERO) or other authorized transmitter from modem or electronically in batch mode. Magnetic tapes will not be accepted. Initially, e-payments with tax returns will only be accepted from authorized transmitters.

The Financial Management Service (FMS) and IRS have designated First Chicago and NationsBank as Depository and Financial/Fiscal Agents of the United States as processors of the Electronic Federal Tax Payment System (EFTPS). This relationship is covered by a Memorandum of Understanding with each bank covering eight years from 1995 through 2003. The services provided relate to EFTPS and are as follow: process electronic federal tax payment information, transmit the data associated with these payments directly to the IRS, classify and report summary data to FMS, and participate in educating the financial community about electronic payment of taxes.

Automated Clearinghouse (ACH) Debit and Credit card transactions involved with an electronically filed tax return are dependent on solution to the issues regarding electronic authentication (See RFP ATTACHMENT 6).

The settlement date is the business date on which the designated bank account or charge account is debited. The required data fields to identify each tax payment are the four digit NAME CONTROL¹, PRIMARY TAXPAYER IDENTIFICATION NUMBER (as shown on the tax return for the year for which the payment applies), BANK ROUTING TRANSIT NUMBER, TYPE OF ACCOUNT, OF PAYMENT, TAX PERIOD², AMOUNT OF PAYMENT, SETTLEMENT DATE and A DAYTIME

¹This includes: receiving and warehousing deposit reports from taxpayers, originating all ACH debit files, and receiving all FEDWIRE and ACH credit files.

²A NAME CONTROL is made up of the first four characters of the last name of the principal taxpayer for whom the tax is being paid.

PHONE NUMBER where the taxpayer can normally be reached. For ACH debit transactions, warehousing offers individual taxpayers the option of making their tax payment authorization up to 105 days in advance of tax due date, as long as the transaction is initiated on or before April 9. For businesses, warehousing payments up to 30 days in advance of tax due date is possible.

~~Proposals shall address privacy and security safeguards of taxpayer payment information as well as frequency and content of periodic reports on tax payment activity and systems capabilities to enable electronic transmission of information and data to IRS.~~

In general, no person may use or disclose any information relating to debit or credit card transactions other than for purposes directly related to the processing of such transactions, or the billing or collection of amounts charged or debited. Exceptions are as follows:

- Debit or credit card issuers or others acting on behalf of such issuers may also use and disclose such information for purposes directly related to servicing an issuer's accounts.
- Debit or credit card issuers or others directly involved in the processing of credit or debit card transactions or the billing or collection of amounts charged or debited may also use and disclose such information for purposes directly related to:
 1. Statistical risk and profitability assessment;
 2. Transferring receivables, accounts or interest therein;
 3. Auditing the account information;
 4. Complying with Federal, State or local law; and
 5. Properly authorized civil, criminal or regulatory investigation by Federal, State or local authorities.

Note: For additional information, see answers to Industry questions on the Final RFP Numbered 1, 2, 4, 6, 7, 36 through 50, 52 through 57, and 80.

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MARKET SEGMENT CUSTOMER RATING

A Focus Group Review, as described in Step 2, Factor 3 of the proposal evaluation (see the RFP's Section E.3.2), will be conducted according to the following procedure. The IRS will request that the offerors remaining in the evaluation process after the Step 1 down-select to submit a brief description of their proposal feature(s). This brief description will be end-user oriented so that the reviewing customers can understand the impact of the feature on them. For example, if the IRS were to develop such a statement on the current paperlessTeleFile, the statement might say: "Make TeleFile completely paperless by: (1) replacing paper form 1040TEL authentication with IRS-generated Customer Service Number (CSN) and (2) adding key information from Form W-2 to TeleFile script to permit waiving the requirement to submit paper Form W-2. The CSN is a single-use authentication method that will be issued with the TeleFile package via mail each year." (Please note this TeleFile change was made for the 1996 filing season and is historical information used only to present an example.)

The IRS will separate these feature statements by customer market segment and submit them to its Office of Public Liaison electronically. The Office of Public Liaison will make the appropriate market segment features available to the associations (Focus Group participants - see table below) electronically. For example:

RETURNS IN THE MARKET SEGMENTS BELOW -----	WOULD BE REVIEWED BY THE FOLLOWING ORGANIZATIONS:
Individual returns filed by tax preparers	AICPA, NAEA, NSA
Individuals who use a software package to prepare their return	AARP and organizations representing small businesses such as: National Association of Self-Employed and National Federation of Independent Businesses
Individuals who prepare their return manually	AARP and organizations representing small businesses such as: National Association of Self-Employed and National Federation of Independent Businesses
Form 941	APA and organizations representing small businesses as listed above

Form 1065	AICPA, NAEA, NSA, and organizations representing small businesses as listed above
Form 1041	AICPA, NAEA, NSA

The identity of the offerors will not be revealed to the Office of Public Liaison or any of the associations assisting in obtaining customer feedback.

The associations will be soliciting volunteers from their organizations to review the feature statements and rate the impact the feature(s) would have on the customers' likelihood to use an electronic filing method. The number of reviews the IRS receives will be dependent on the number of volunteers the groups can obtain during the review period. The Office of Public Liaison will compile the results of the reviews and provide those results to the Contracting Officer. The results will be considered in the final proposal evaluation and source selection decision-making..

Market Segment Customer Rating
Individual Returns Filed by Tax Practitioner

We want to determine what impact the feature or combination of features described in the left column of the table below would have on your decision regarding whether or not to use an electronic method of submitting your clients' tax returns.

The proposed feature described in the left column would: *(Read choices and rate the feature using the numbers 1 through 4 according to the reactions described below):*

Reaction	Rating
Very likely cause me to choose or recommend to my clients an electronic filing method.	4
Possibly cause me to choose or recommend to my clients an electronic filing method.	3
Not influence my decision to choose or recommend to my clients an electronic filing method.	2
Cause me to not choose or recommend to my clients an electronic filing method.	1

PROPOSED FEATURE	YOUR RATING
Feature 1	
Feature 2	
Feature 3	
Feature n	

Comments:

Suggestions:

Market Segment Customer Rating
Individuals Who Use a Software Package to Prepare their Return

We want to determine what impact the feature or combination of features described in the in the left column of the table below would have on your decision regarding whether or not to use an electronic method of submitting your tax return.

The proposed feature described in the left column would: *(Read choices and rate the feature using the numbers 1 through 4 according to the reactions described below):*

Reaction	Rating
Very likely cause me to choose an electronic filing method.	4
Possibly cause me to choose an electronic filing method.	3
Not influence my decision to choose an electronic filing method.	2
Cause me to not choose an electronic filing method.	1

PROPOSED FEATURE	YOUR RATING
Feature 1	
Feature 2	
Feature 3	
Feature n	

Comments:

Suggestions:

Market Segment Customer Rating
Individuals Who Prepare their Return Manually

We want to determine what impact the feature or combination of features described in the in the left column of the table below would have on your decision regarding whether or not to use an electronic method of submitting your tax return.

The proposed feature described in the left column would: *(Read choices and rate the feature using the numbers 1 through 4 according to the reactions described below):*

Reaction	Rating
Very likely cause me to choose an electronic filing method.	4
Possibly cause me to choose an electronic filing method.	3
Not influence my decision to choose an electronic filing method.	2
Cause me to not choose an electronic filing method.	1

PROPOSED FEATURE	YOUR RATING
Feature 1	
Feature 2	
Feature 3	
Feature n	

Comments:

Suggestions:

Market Segment Customer Rating
Form 1041

We want to determine what impact the feature or combination of features described in the left column of the table below would have on your decision regarding whether or not to use an electronic method of submitting your clients' tax returns.

The proposed feature described in the left column would: *(Read choices and rate the feature using the numbers 1 through 4 according to the reactions described below):*

Reaction	Rating
Very likely cause me to choose or recommend to my clients an electronic filing method.	4
Possibly cause me to choose or recommend to my clients an electronic filing method.	3
Not influence my decision to choose or recommend to my clients an electronic filing method.	2
Cause me to not choose or recommend to my clients an electronic filing method.	1

PROPOSED FEATURE	YOUR RATING
Feature 1	
Feature 2	
Feature 3	
Feature n	

Comments:

Suggestions:

Market Segment Customer Rating
Form 1065

We want to determine what impact the feature or combination of features described in the left column of the table below would have on your decision regarding whether or not to use an electronic method of submitting your clients' tax returns.

The proposed feature described in the left column would: *(Read choices and rate the feature using the numbers 1 through 4 according to the reactions described below):*

Reaction	Rating
Very likely cause me to choose or recommend to my clients an electronic filing method.	4
Possibly cause me to choose or recommend to my clients an electronic filing method.	3
Not influence my decision to choose or recommend to my clients an electronic filing method.	2
Cause me to not choose or recommend to my clients an electronic filing method.	1

PROPOSED FEATURE	YOUR RATING
Feature 1	
Feature 2	
Feature 3	
Feature n	

Comments:

Suggestions: